Enterprise Wide Referral and Authorization System (EWRAS) Business Rule Documentation Training
Part 2

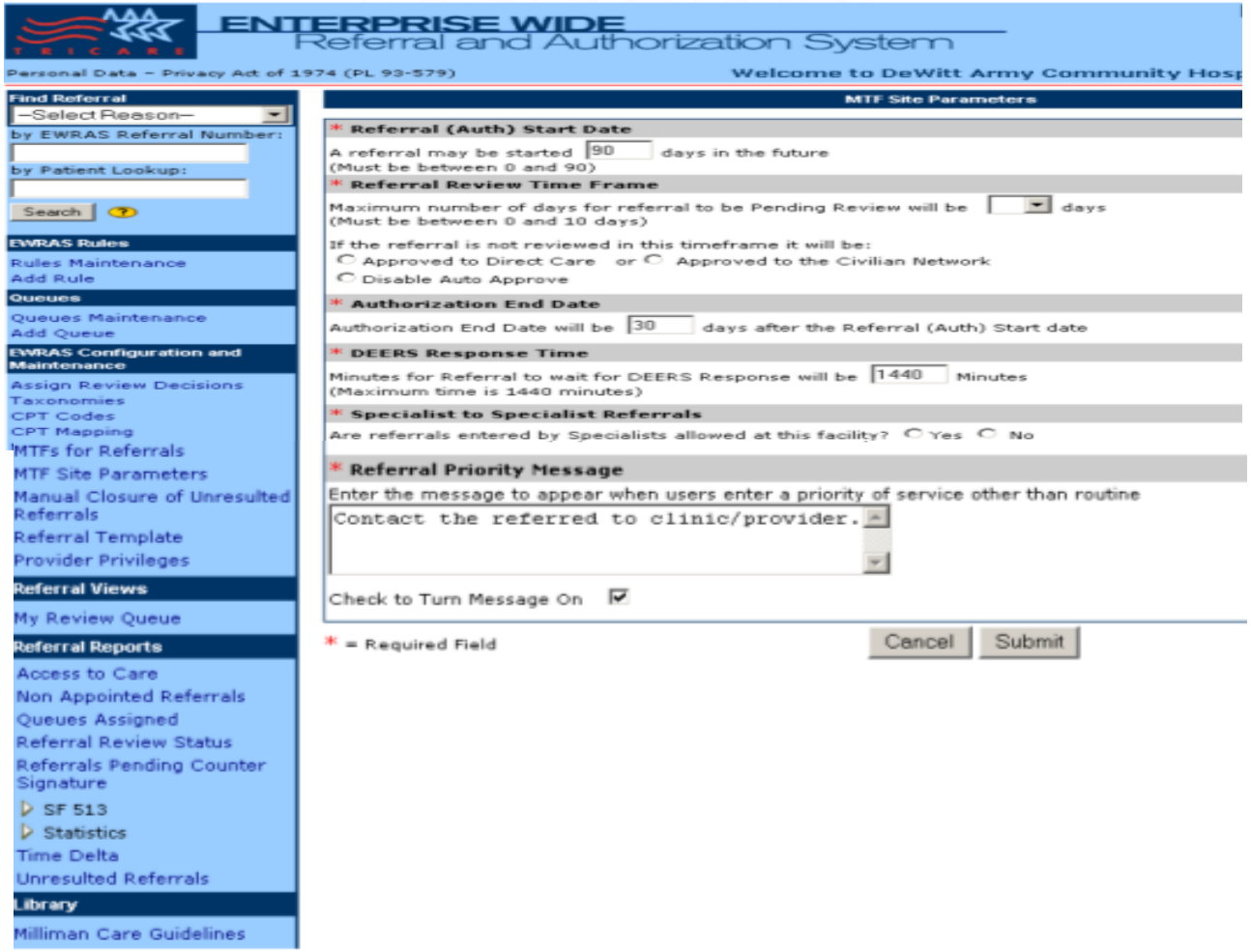
Agenda

- **MTF Configuration**
- **Review Queues**
- **Documenting Business Rules**
  - **Specialty**
  - **Health Services**
  - **Durable Medical Equipment**
  - **Admissions**

Audience

- **Facility EWRAS Project Officers**
  - **Management of all EWRAS related activities at the facility MTF knowledge of Clinical Operations**
- **Facility Training Coordinator**
  - **Involve from the beginning**
  - **Responsible for training their MTF personnel on the EWRAS**
- **EWRAS Rules Manager**
  - **Critical member of EWRAS implementation team.**
  - **Responsible for mapping, documentation of rule sets, input of rule sets into the EWRAS**

MTF Configuration


ENTERPRISE WIDE
Referral and Authorization System
Personal Data – Privacy Act of 1974 (PL 93-579)
Welcome to DeWitt Army Community Hosp
Find Referral
–Select Reason–
by EWRAS Referral Number:
by Patient Lookup:
Search
EWRAS Rules
Rules Maintenance
Add Rule
Queues
Queues Maintenance
Add Queue
EWRAS Configuration and Maintenance
Assign Review Decisions
Taxonomies
CPT Codes
CPT Mapping
MTFs for Referrals
MTF Site Parameters
Manual Closure of Unresulted Referrals
Referral Template
Provider Privileges
Referral Views
My Review Queue
Referral Reports
Access to Care
Non Appointed Referrals
Queues Assigned
Referral Review Status
Referrals Pending Counter Signature
SF 513
Statistics
Time Delta
Unresulted Referrals
Library
Milliman Care Guidelines
MTF Site Parameters
* Referral (Auth) Start Date
A referral may be started 90 days in the future
(Must be between 0 and 90)
* Referral Review Time Frame
Maximum number of days for referral to be Pending Review will be days
(Must be between 0 and 10 days)
If the referral is not reviewed in this timeframe it will be:
Approved to Direct Care or Approved to the Civilian Network
Disable Auto Approve
* Authorization End Date
Authorization End Date will be 30 days after the Referral (Auth) Start date
* DEERS Response Time
Minutes for Referral to wait for DEERS Response will be 1440 Minutes
(Maximum time is 1440 minutes)
* Specialist to Specialist Referrals
Are referrals entered by Specialists allowed at this facility? Yes No
* Referral Priority Message
Enter the message to appear when users enter a priority of service other than routine
Contact the referred to clinic/provider.
Check to Turn Message On
* = Required Field
Cancel
Submit

-

MTF Configuration Decisions

Review Decisions

- **Determine the review decisions that apply to the reviewer and review administrator**
- **Disable reviews**

Taxonomies Set Up

- **Deactivate taxonomies not needed for provider**
  - This can be changed
- **Select multiple taxonomies at once**
  - Taxonomies will map to CHCS clinic specialties

CPT Set Up

- **Set up list available at MTF**
- **Assign a clinic specialty and select the CPT**

MTF Configuration Decisions

Other MTFs

- List all MTFs' to whom you will route referrals

Site Parameters

- Define certain site parameters
  - Site definable message
  - Default Authorization Start Date
  - Default Authorization End Date
  - Max days for referral to be in MTF review queue
  - Max amount of time for referral to await DEERS response
  - Specialist to Specialist referrals optional

MTF Configuration Decisions

Assign Provider Privileges

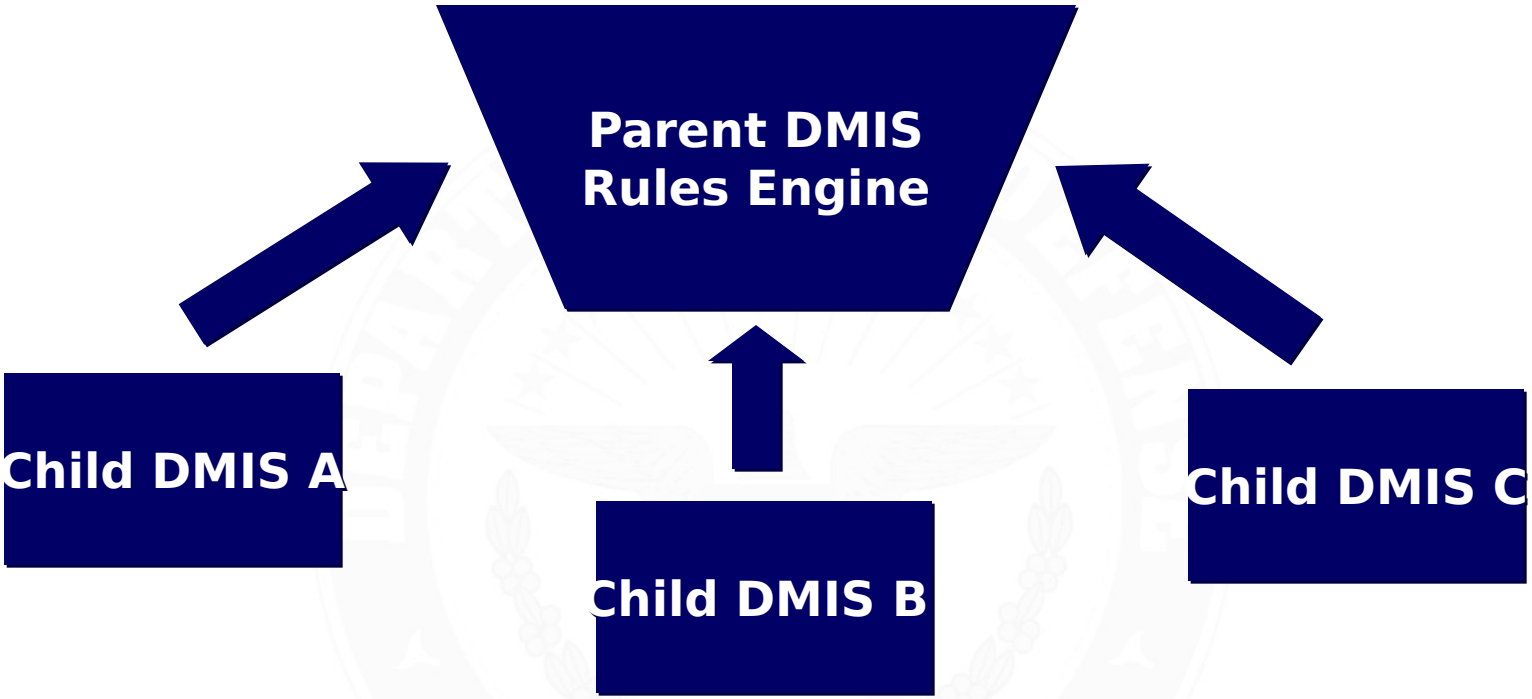
- Assign countersigning privileges to providers
- Remove countersigning privileges

Referral Template

- Associate taxonomies, CPTs, and the DME category of referrals with a standard reason for the referral

Review Queues

- **Provide a collection point for referrals**
- **Reviewers will assign themselves to a queue in order to access the referrals**
- **Child DMIS sites can create review queues within Parent DMIS Queue List**

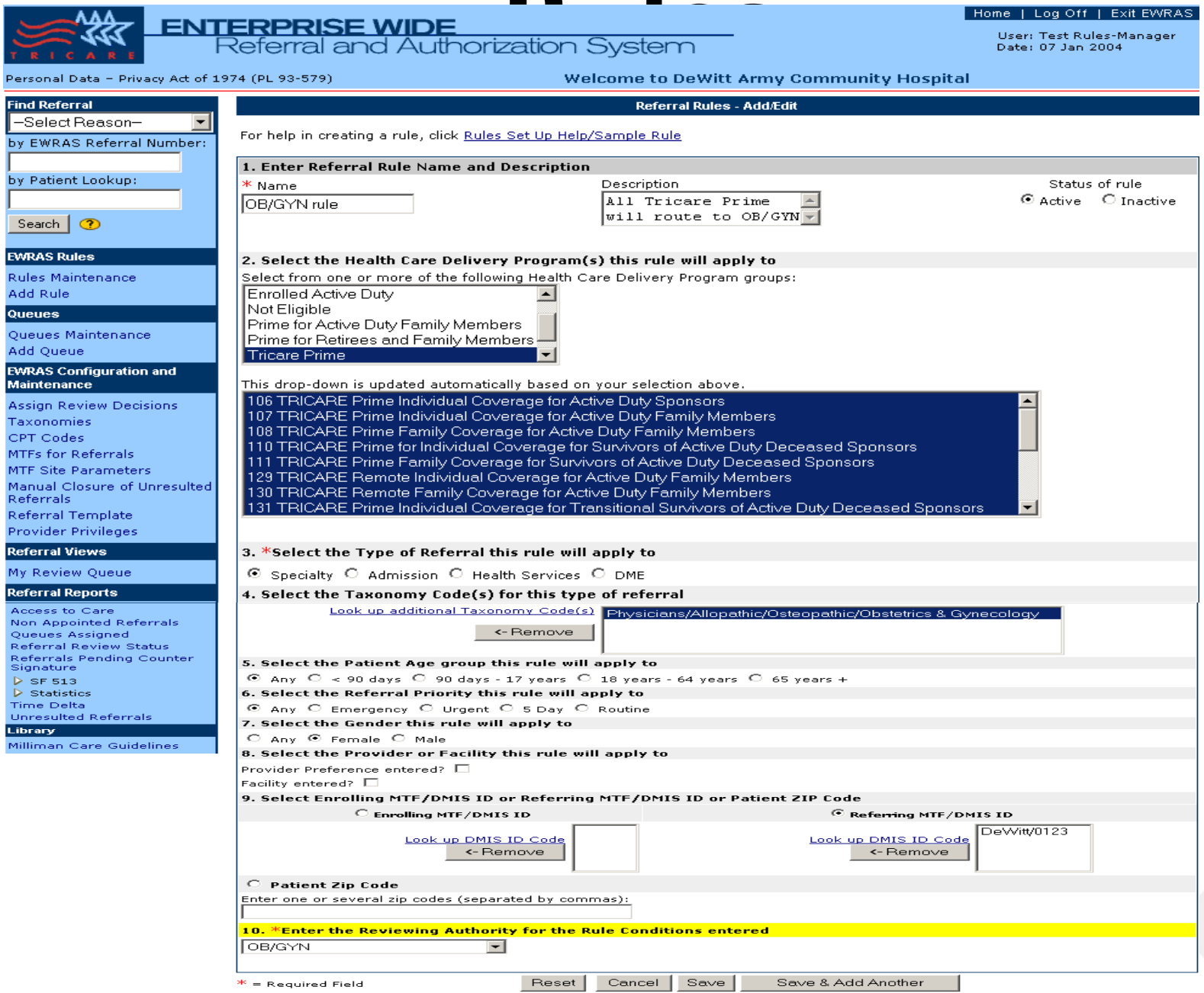


- **Rules Engine resides at Parent DMIS**
- **Child DMIS can add review queues and site specific rules to parent rules engine**
- **Recommend standard naming convention to identify child DMIS rules**

MTF Review Queue Decisions

- **Which clinics need a review queue?**
- **Does your MTF need a referral management queue?**
- **Does each child DMIS want their own queues?**

Creating Business Rules


ENTERPRISE WIDE
Referral and Authorization System
Home | Log Off | Exit EWRAS
User: Test Rules-Manager
Date: 07 Jan 2004
Personal Data – Privacy Act of 1974 (PL 93-579)
Welcome to DeWitt Army Community Hospital
Find Referral
–Select Reason–
by EWRAS Referral Number:
by Patient Lookup:
Search
EWRAS Rules
Rules Maintenance
Add Rule
Queues
Queues Maintenance
Add Queue
EWRAS Configuration and Maintenance
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Queues Assigned
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Unresulted Referrals
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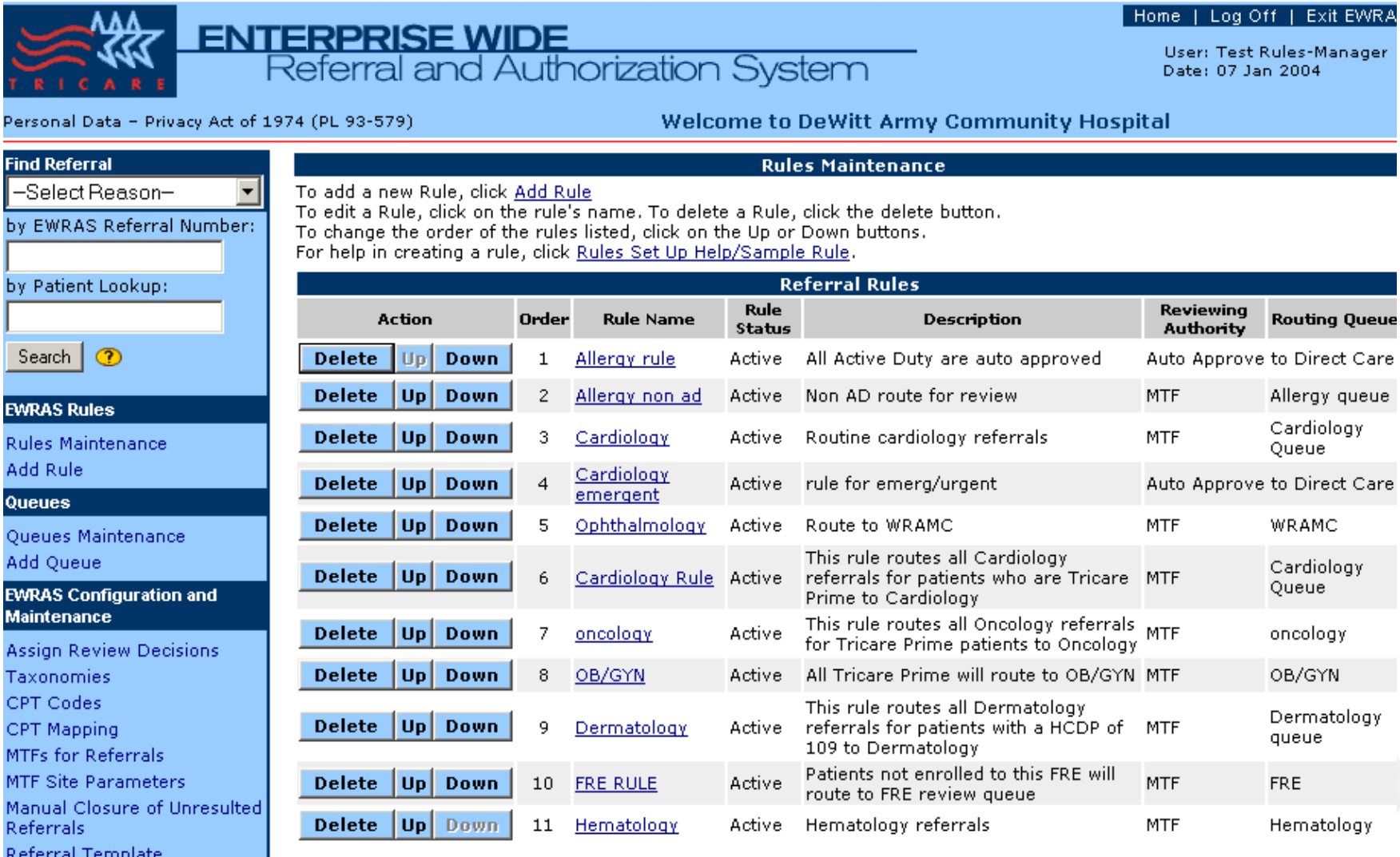
Milliman Care Guidelines
Referral Rules - Add/Edit
For help in creating a rule, click Rules Set Up Help/Sample Rule
1. Enter Referral Rule Name and Description
* Name
OB/GYN rule
Description
All Tricare Prime will route to OB/GYN
Status of rule
Active
Inactive
2. Select the Health Care Delivery Program(s) this rule will apply to
Select from one or more of the following Health Care Delivery Program groups:
Enrolled Active Duty
Not Eligible
Prime for Active Duty Family Members
Prime for Retirees and Family Members
Tricare Prime
This drop-down is updated automatically based on your selection above.
106 TRICARE Prime Individual Coverage for Active Duty Sponsors
107 TRICARE Prime Individual Coverage for Active Duty Family Members
108 TRICARE Prime Family Coverage for Active Duty Family Members
110 TRICARE Prime for Individual Coverage for Survivors of Active Duty Deceased Sponsors
111 TRICARE Prime Family Coverage for Survivors of Active Duty Deceased Sponsors
129 TRICARE Remote Individual Coverage for Active Duty Family Members
130 TRICARE Remote Family Coverage for Active Duty Family Members
131 TRICARE Prime Individual Coverage for Transitional Survivors of Active Duty Deceased Sponsors
3. *Select the Type of Referral this rule will apply to
Specialty
Admission
Health Services
DME
4. Select the Taxonomy Code(s) for this type of referral
Look up additional Taxonomy Code(s)
<- Remove
Physicians/Allopathic/Osteopathic/Obstetrics & Gynecology
5. Select the Patient Age group this rule will apply to
Any
< 90 days
90 days - 17 years
18 years - 64 years
65 years +
6. Select the Referral Priority this rule will apply to
Any
Emergency
Urgent
5 Day
Routine
7. Select the Gender this rule will apply to
Any
Female
Male
8. Select the Provider or Facility this rule will apply to
Provider Preference entered?
Facility entered?
9. Select Enrolling MTF/DMIS ID or Referring MTF/DMIS ID or Patient ZIP Code
Enrolling MTF/DMIS ID
Look up DMIS ID Code
<- Remove
Referring MTF/DMIS ID
Look up DMIS ID Code
<- Remove
DeWitt/0123
Patient Zip Code
Enter one or several zip codes (separated by commas):
10. *Enter the Reviewing Authority for the Rule Conditions entered
OB/GYN
* = Required Field
Reset
Cancel
Save
Save & Add Another

EWRAS Routing Criteria

- **Health Care Delivery Program** (HCDP)
- **Type of referral** (Specialty/Health Services/Durable Medical Equipment (DME)/Admission)
- **Provider Taxonomy/CPT Code/Admission Type**
- **Patient age**
- **Referral priority** (Emergency/Urgent/5 Day/Routine)
- **Patient gender**
- **Provider preferences** (Did the provider ask for a specific MTF or Provider)
- **Referring (incoming) MTF**
  - Enrollment site
  - Referring site
  - ZIP CODE of patient

EWRAS Rules List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TRICARE
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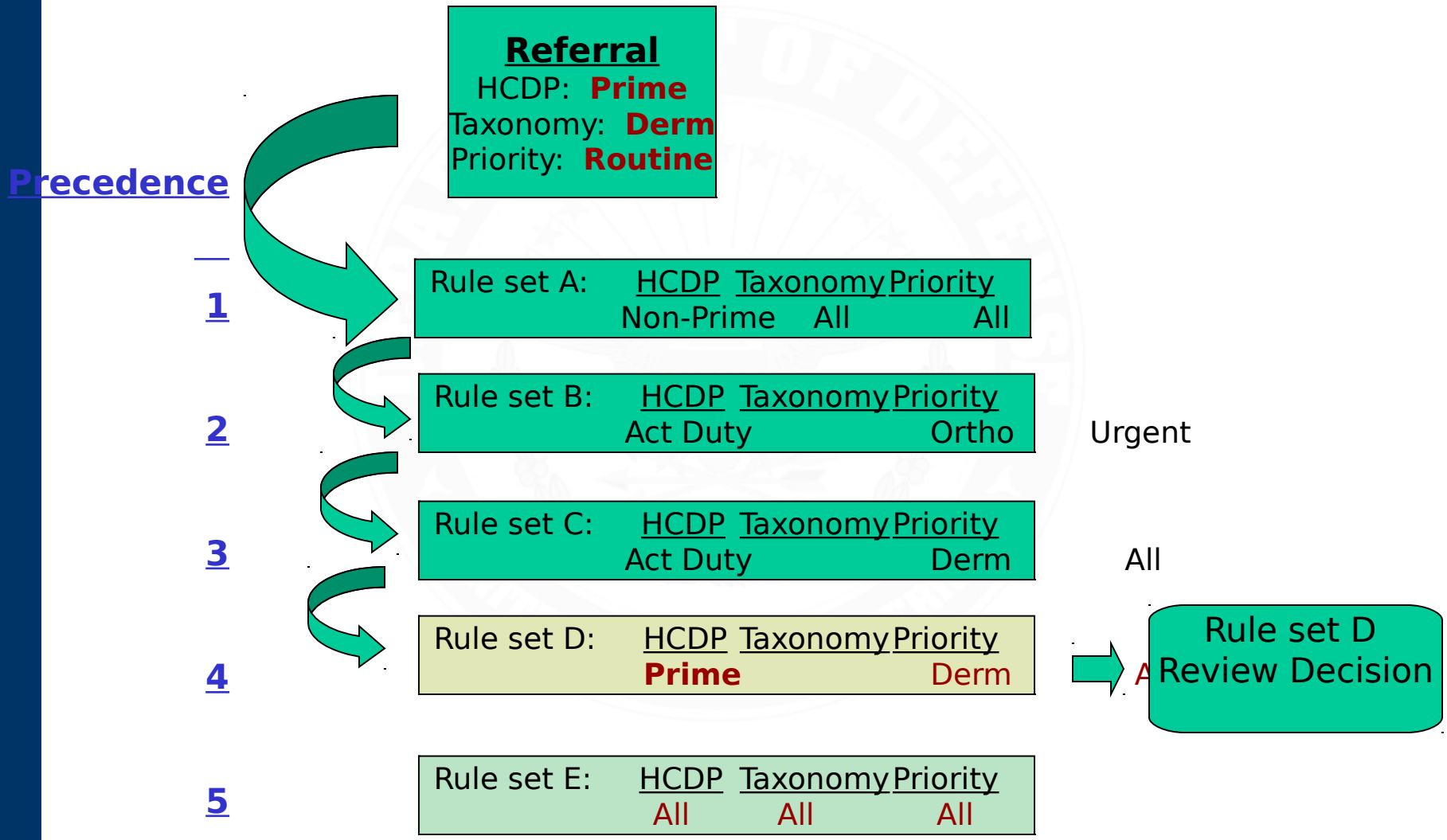
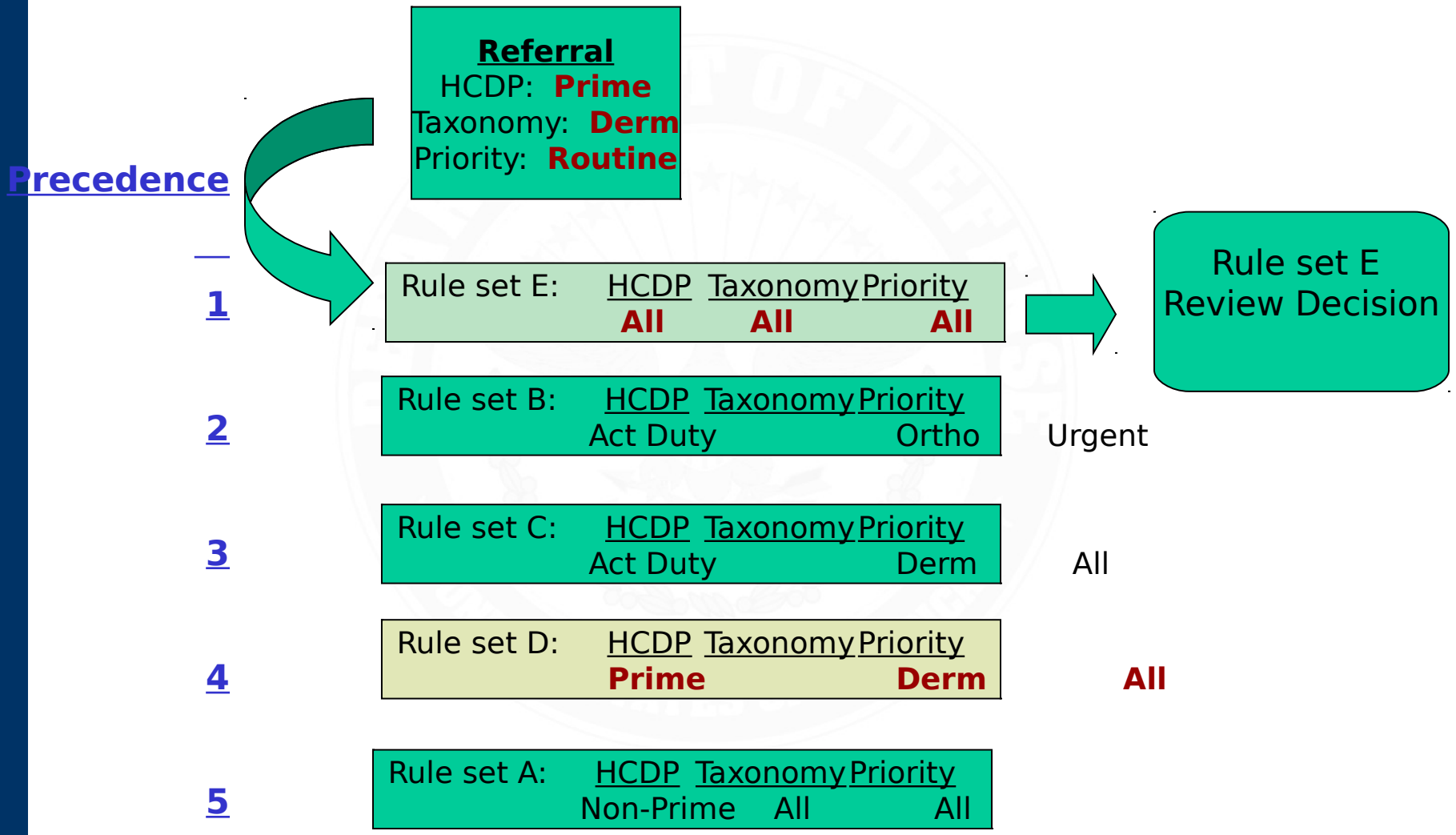
Referral Template
Rules Maintenance
To add a new Rule, click Add Rule
To edit a Rule, click on the rule's name. To delete a Rule, click the delete button.
To change the order of the rules listed, click on the Up or Down buttons.
For help in creating a rule, click Rules Set Up Help/Sample Rule.
Referral Rules
Action
Order
Rule Name
Rule Status
Description
Reviewing Authority
Routing Queue
Delete Up Down 1 Allergy rule Active All Active Duty are auto approved Auto Approve to Direct Care
Delete Up Down 2 Allergy non ad Active Non AD route for review MTF Allergy queue
Delete Up Down 3 Cardiology Active Routine cardiology referrals MTF Cardiology Queue
Delete Up Down 4 Cardiology emergent Active rule for emerg/urgent Auto Approve to Direct Care
Delete Up Down 5 Ophthalmology Active Route to WRAMC MTF WRAMC
Delete Up Down 6 Cardiology Rule Active This rule routes all Cardiology referrals for patients who are Tricare Prime to Cardiology MTF Cardiology Queue
Delete Up Down 7 oncology Active This rule routes all Oncology referrals for Tricare Prime patients to Oncology MTF oncology
Delete Up Down 8 OB/GYN Active All Tricare Prime will route to OB/GYN MTF OB/GYN
Delete Up Down 9 Dermatology Active This rule routes all Dermatology referrals for patients with a HCDP of 109 to Dermatology MTF Dermatology queue
Delete Up Down 10 FRE RULE Active Patients not enrolled to this FRE will route to FRE review queue MTF FRE
Delete Up Down 11 Hematology Active Hematology referrals MTF Hematology



Criteria is for example purposes only.



Criteria is for example purposes only.

MTF Business Rule Decisions

- How complicated do you want your rule sets?
- What specialty services are available at MTF?
- What specialty services are available in local direct care catchment area?
- What referral criteria will be reviewed by a specialty clinic?
- What referral criteria will be auto approved to direct care?
- What referral criteria will be auto approved to the civilian network?
- What referral criteria will be routed to another MTF?

Documenting Business Rules

- **Documenting rules prior to EWRAS arriving will be essential to a successful deployment**
- **Documenting tools will be provided to assist MTFs**
  - **Required use: service level decision**
  - **Modifying tools to fit your MTF's needs: service level decision**

Sample Spreadsheet

EWRAS Specialty Referral Worksheet (example only)

										Can only select One				
Order	CHCS Mappii	Rule Name	Rule Description	HCDP	Taxonomy	Age	M/F	Provide r Pref	Facility Pref	Referrin g Site	Enrollment Site	Referrin g zip	Review Decision	Fwding MTF
1	Adolesent Medicine	Adolesent Med	Prime Adol Med Referrals	All Enrolled	all Adol Med	12-18	All	No	No	NA	NA	NA	Auto-Approve Direct Care	
2	Allergy	Allergy AD	Allergy for all active duty	ADY	5,6,8	All	All	No	No	NA	NA	NA	Auto-Approve Direct Care	
3	Allergy	Allergy Prime	Allergy for all Prime	AFM,RFM,RET	5,6,8	All	All	No	No	NA	NA	NA	Allergy Queue	
4	Allergy	Allergy Non-Prime	Allergy for all Non Prime	All Non-Enrolled	5,6,8	All	All	No	No	NA	NA	NA	Net	
5	Allergy	Allergy Lab	Allergy Lab for all	All	7	All	All	No	No	NA	NA	NA	Auto-Approved Direct Care	
6	Anesthesiology	Anesthesiology	Anesthesiology to WRAMC	All	All Anesth	All	All	No	No	NA	NA	NA	MTF	WRAMC
7	Audiology	Audiology Preference selected	Active Duty Audio if provider enters preference	ADY	All Audio	18-65	All	Yes	Yes	NA	NA	NA	Audiology Queue	
8	Audiology	Act Duty Audio	Active duty referrals rule set	ADY	All Audio	18-65	All	No	No	NA	NA	NA	Auto-Approve Direct Care	
9	Audiology	General Audio	Remaining Audio Referrals	All	All Audio	All	All	No	No	NA	NA	NA	Auto-Approved Civ Net	
10	Cardiology	DeWitt Cardio	Enrolled Cardiology Rule set from DeWitt	All Enrolled	18	18-65	All	No	No	DeWitt	NA	NA	Cardio Queue	
11	Cardiology	Rader Cardio	Enrolled Cardiology Rule set from Rader	All	18	18-120	All	No	No	Rader	NA	NA	Rader Cardio Queue	
12	Cardiology	General Cardio	All Other Cardio	All	All	All	All	No	No	NA	NA	NA	MTF	WRAMC
13	Community Health	Community Health	All Community Health Referrals	All	All	All	All	No	No	NA	NA	NA	Auto-Approved Civ Net	
14	Dermatolgy	Derm Prime	Derm referrals for all Prime	All Enrolled	54-58	18-65	All	No	No	NA	NA	NA	Derm Queue	
15	Dermatolgy	Peds Derm	Derm for Peds	AFM	59	1-17	All	No	No	NA	NA	NA	Pediatic Queue	
16	Gynecology	GYN Rule	All GYN	All	All GYN	All	F	No	No	NA	NA	NA	MTF	NNMC
17	Internal Medicine	IM Prime	All Enrolled IM	All Enrolled	154	18-64	All	No	No	NA	NA	NA	Auto-Approved Direct Care	
18	Internal Medicine	IM Senior	IM for all patients over 65	TSP, TSD	154	65-120	All	No	No	NA	NA	NA	Internal Medicine Review Queue	
19	Internal Medicine	IM Admin review	IM with provider or Facility Pref entered	All	All IM	All	All	Yes	Yes	NA	NA	NA	DeWitt Admin Queue	
20	Internal Medicine	IM General	IM General Rule set	All	All IM	All	All	No	No	NA	NA	NA	Auto-Approved Civ Net	

Conclusion

- **Coordinate with MTF Commander**
- **Coordinate with MTF Clinical Staff**
- **Take the time to correctly document your business rules the first time**
- **Consider other business process decisions**
  - **Referral Management Center**
  - **Optimizing patient access to care**
  - **Memorandums of Understanding with MCSCs**
  - **Coordination with area market manager**